webQDA®

qualitative data analysis

QUICK USER'S GUIDE

universidade de aveiro
theoria poiesis praxis

Original Title
webQDA - Quick Use Guide

Team Project
Researchers: CIDTFF - Department of Education, University of Aveiro
Francislê Neri de Souza
António Pedro Costa
António Moreira
Dayse Neri de Souza
Fabio Freitas

Partners
Micro i/o
• Project Manager: Carlos Franco
• Programming: Paulo Rocha, José Paulo, Marco Pereira, Pedro Marquinhos and Ricardo Tavares
• Design: Tânia Santos

Design and Pagination
Fábio Freitas

English Translation
António Moreira

Edition
UA Editora
University of Aveiro
Library Services, Document Information and Museology
1st edition - September 2016

ISBN: 978-972-789-499-4

Index

1. Introduction

Research in the humanities and social sciences in general, and in particular in education, has gone through many transformations over the past decades. Like with all branches of science, these also influenced and were influenced by specific developments in the field and technologies

For over 30 years, computer applications have been helping users make qualitative analysis of non-numerical and unstructured data, presenting the users with results in the form of numerical arrays, triangulated with descriptive discourse of a qualitative nature, which supports them in their interpretations (Neri de Souza Costa, & Moreira, 2010).

webQDA is a software that performs text, video, audio and image analysis that works in a collaborative and distributed environment based on the Internet. webQDA seeks to meet this need, mainly because the research projects are increasingly developed in a multidisciplinary context and with the involvement of users that are geographically dispersed. It also fills in the gap of many programs that "require" the user to expect that his/her colleagues develop "their part of the project", so that the file is sent to him/her, and only then be able to enter his/her contribution, a process that could actually be lost in a really collaborative work. With webQDA both data sources and the indexing system (categories and definitions) may be made available online for all users who are granted access to them. Even for a single work, the user can, through webQDA, access his/her project on any computer with internet access, and not only on those in which it is installed (see prerequisites of use in point 2). As it so happens with other similar applications, in webQDA the users can edit, view, link and organize documents. You can create categories, encode, manage, filter, perform searches and question the data in order to answer your research questions. webQDA will be presented as a specific software targeted to qualitative research in general, providing many advantages as compared with research using other applications (Neri de Souza Costa, & Moreira, 2010).

2. webQDA Iconography

The new version of webQDA contains a new system of icons that will help in the operations you want to perform. In the table below you can find all the icons that are present in the new version of webQDA and their respective functionality.

	Main menu		Edit
	Preview		Copy
	Down		Cut
	Up		Paste
	Before		Mix
	After		Erase
	More		Record
	Less		Encode
	Video		Decode
	Text		Hide Encoding
	Audio		Free Codes
	Image		Tree Codes
	Notes		Empty Code
	Close		Open Code
	Folder		PDF
	Excel		DOCX
	Invite		Block

3. Account Creation

This process will occur only the first time you access the system. The first time you access webQDA (http://app.webqda.net/) by clicking Create Account, a second window will appear to enter the **name**, **email**, **password** and **language**. An email will automatically be sent to you to confirm your registration.

4. webQDA Management Area

4.1 Project Creation

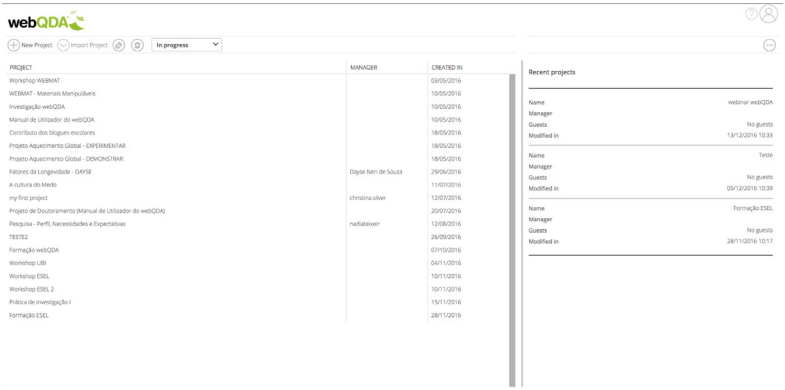

Figure 1 - webQDA projects environment.

After accessing webQDA using the login (Email) and password, you will have access to the administrative area in the management of projects. Here you can create, manage or access projects (Figure 1).

To create a new project:

1. Click ⊕ "New Project";
2. Assign a name and a description to the project.

Note: a single project in webQDA may contain the various sources of data necessary to achieve the objectives outlined by the user. Therefore, it is not necessary to create different projects for a set of data that will be crossed, to answer the same set of research questions. Assign a title to the project (we recommend that it is short, with one to three keywords) and make a description of it as complete as possible, based on, for example, the research questions.

4.2 Importing a Project

For users who have backups of the previous projects in version 2.0 of webQDA there is the possibility of importing these projects to the new version of webQDA. To do this:

1. Access the ⌄ "Import Project" function;
2. "Select project to import".

4.3 Editing a Project

webQDA lets you change the name of your project, add a description or signal its state. For such purpose:

1. Select the project you want to edit;
2. Go to "Edit Project";
3. Fill in/edit the Name, Description and State of the project.

4.4 Project Sharing

To invite other users (e.g., supervisors, to share the project) you must:

1. Access the project;
2. Select the "Users" tab;
3. Click on the function "Invite".

Note: There are two User Profiles:

- Collaborating researcher: the researcher invited has permissions to edit and enter data in a given project;
- Guest Researcher: the guest researcher only has permission to view the data available in a given project.

The command "Lock" prevents a particular user from continuing accessing a given project.

4.5 Personal Area (Personal Area Window - Account Settings)

In Personal Area you can edit your personal data, change the password, report detected errors and provide feedback directly to the webQDA team.

1. Access the icon ;
2. Click on "Account Settings", "Change password" or "Report errors", according to the action you want to perform.

The Personal Area also allows you to view the duration of your license, as well as log out of your session.

5. Sources System

After you create and open the project, you will have immediate access to the data system, here designated as Sources. In the Sources space, there are three different functionalities: Internal Sources, External Sources and Notes (Figure 2).

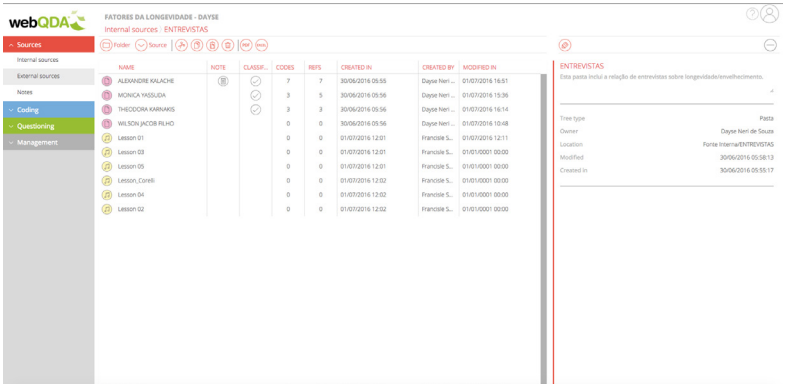

Figure 2 - Sources system environment.

5.1 Internal Sources

In the space related to internal sources the user can insert his/her data (text, video, image or audio). We recommend that for each type of file, and not file format (.docx, .jpeg, .flv., Mp3 ... etc.), a folder to contain all the files be created. For example, if the investigation has interviews, create a folder called interviews and insert all transcripts in text or videos/audios of all study participants who were interviewed. Other folders should be created by document type, such as Portfolio, Reports, Forums, Blogs, Journals. Although possible, we do not encourage excessive creation of subfolders. For example, you should not create folders for documents per participant in the study, since webQDA has other tools to make such differentiation.

5.1.2 Creating folders in Internal Sources

To create folders and subfolders in the Internal Sources follow these steps:

1. Select “Internal Sources”;
2. Access located in the Main Menu (top horizontal bar);
3. By clicking, a window will pop up so as you name the folder (for example, Interviews). It is important, for organizational matters, to fill in the field for the Description.

Note: Repeat the same action to create New Folders or Subfolders for all types of files/research data for the project.

5.1.3 Inserting text documents, image, audio and video in the Internal Sources

The new 3.0 version allows you to insert multiple documents in multiple formats in a single operation. For this the user should select the folder where he/she wants to insert the document(s) - for example, to insert interviews documents, select the Interviews folder. It is possible, in webQDA, to work with various types of files:

- Text: txt, rtf, doc, pdt and docx;
- Image: jpeg, jpg, gif and png;
- Audio: mp3;
- Video: flv, mp4 and f4v.

To import documents follow the steps below:

1. Select the folder where you want the text document to be inserted;
2. Click ⌄ "Source" from the Main Menu (top horizontal bar);
3. Click "Upload";
4. After opening the new window, select the document you want to add to the folder.

Note: There are two options for entering data in the selected folder:

I) "**Upload**": Allows you to import a text document that is stored in your computer, external drive, among others, to the internal sources. You can import text documents in .docx, doc, .txt and .rtf. However, we recommend text documents in .docx format.

II) "**New Text**": Allows you to create a new text, writing and editing directly in the webQDA text editor, or copy (Windows – Ctrl + C; Mac – cmd + C) and paste (Windows – Ctrl + V; Mac – cmd + V) existing text.

5.1.4 Processing images

To start processing images you should:

1. Click on the image to be analyzed;
2. After clicking, the "Edit" command will appear on the top horizontal menu;
3. Go to "Edit";
4. Click the mouse left button (holding it) and freely drag it over the image to form a square or rectangle of the area you want to analyze;
5. After forming the square or rectangle on the image, the part of the image associated with the square or rectangle will appear below the area designated as a description so you can describe it;
6. By default, the square or rectangle selected for analysis will be in light red color. If you want to change the color of the square or rectangle, you must click the command "Color", located in the intermediate menu, select the color you want, and then click "Apply";
7. To save the changes made you should access the icon, in order to save the operation performed.

In case you want to edit the created processing or even delete it:

1. Enter the command "Edit" and change the text;
2. If you want to delete an area that you selected you must click the icon located to the left of the description of the area you want to delete.

In the description, you will see that each selected area in the image has a corresponding color. To its side you find the field for the description (which can be edited) of the analysis, and then the information of when the area was created and modified.

The Encode and Decode command can be triggered to facilitate coding. By clicking Encode or Decode a window will appear where you can click on categories or subcategories where you want to insert the description.

Note: it should be noted that what will be coded for the categories are descriptions that are in the table and not the segments of the images.

5.1.5 Exporting segments of an Image

You can print all the segments that you created and that are associated in different parts of an image or export them in .pdf format to a folder on your computer.

Here we present the options for printing and exporting:

1. Open an image that contains segments;
2. Click the command PDF.

5.1.6 Processing Audio in the Internal Sources

You can create a set of text segments associated with audio segments, with transcriptions or descriptions, or even a combination of both in various excerpts of the audio file. To process the text segments associated with each audio segment you must follow the following steps:

1. After the user loads the audio to the webQDA project, he/she should click it to open:
2. After clicking, the "Edit" command will appear on the top horizontal menu;
3. Access "Edit";
4. Click on the icon ;
5. You can also increase or decrease the audio volume;
6. With the audio, click "Start Recording" where you want to begin the selection you want to encode later;
7. Allow the audio to play as long as required and then click "End recording" when you want to end the recording of the segment you want to create;
8. Finally, click the command .

You can repeat this process for as many segments as you desire. At the end you will have a set of text segments that can be edited or deleted.

5.1.7 Exporting segments of an Audio file

You can export in .pdf format all segments developed and that are associated in different parts of the audio to a folder on your computer:

1. Open an audio file that contains segments;
2. Click the command PDF ;
3. A .pdf file is automatically generated on your computer.

5.1.8 Processing videos in the Internal Sources

Similarly to what happens with audio you can create text segments

associated with video segments, transcriptions or descriptions, or even a combination of both in various video excerpts. To process the text segments associated with each segment of the video you must follow the steps below:

1. Select the video you want to target;
2. After clicking, the command will appear on the top horizontal menu;
3. Access ;
4. Click Play. You can also increase or decrease the audio volume of the video;
5. With the video playback cursor in the position you want, click the command "Start Recording";
6. Allow the video to play as long as required and click the command "Stop Recording" when deemed appropriate;
7. This brings up a box where the user can enter a transcription or description of the segment created;
8. Finally, click .

After this process (repeated for as many segments as the user wishes) a set of snippets of text will appear that can be edited or deleted.

5.1.9 Exporting Segments of a Video

You can export in .pdf format all segments created and that are associated with different parts of a video to a folder on your computer:

1. Open a video file that contains segments;
2. Click the command ;
3. A .pdf file is automatically generated on your computer.

5.2 External Sources

One of the problems that all qualitative analysis software packages face today is the size of some image, audio and video files, and the internal sources can only import to webQDA the server files with a maximum size of 20MB per file. The solution to this problem presented in webQDA is called External Sources. This space is for files that, given their size, cannot be directly inserted into the webQDA platform (documents, images, audio and video). The new version of webQDA enables the insertion of files on internal sources up to the following boundaries:

- **Sources in Text:** .docx and .txt (Maximum size of 500,000 characters per source);
- **Sources in image**: .jpg and .png (Maximum size of 2MB per image)
- **Sources in Audio:** .mp3 and .wav (Maximum size of 10MB per audio)
- **Sources in Video:** .mp4, .ogg and .webm (Maximum size of 20MB)

As a proposal, we suggest the use of a virtual space that allows uploading files and make available a link with the file extension as the http protocol (Hypertext Transfer Protocol), for example Dropbox (www.dropbox.com). Below is an example of using external sources based on Dropbox. However, another virtual space could be used to allow for the provision of a http link.

1. In the Public folder Dropbox, click the right button on the file you want to insert the external sources;
2. Then click Copy Public Link (there are alternative ways to copy the http link Dropbox provides for each file that is in the Public folder);
3. Open webQDA in the Sources System;
4. Click “External Sources”;
5. Click the “Link” command and choose the type of document you want to add;
6. After choosing the file type a window will appear where you should insert the file name, a description of it and the address link of where the file is stored;
7. Finally click “OK”;
8. Subsequently double-click the file to open the video.

In this way, you can work with Video, Image and Audio, making transcripts and descriptions of the various segmentations the same way as in the internal sources. The External Sources also make available the commands Delete, Copy, Cut, Paste. In the External sources you can create a new folder, modify it and delete it.

5.3 Notes

A feature called “Notes” aims to enable the user to do the preparation of the context of each file, adding some factual observations, inferences and theoretical foundations that support the analysis. As an example, we cite the fact that in an interview, we may notice a gesture or action that may be relevant in the transcription and analysis. A Note on webQDA, such as a document, can be encoded, recoded and classified with the respective attributes.

To insert notes, you should:

1. Click on the functionality “Notes”;
2. Enter the command ;
3. After clicking , a new window will appear where you can write the text;
4. In this window, you have access to the basic functions of the text editor, such as font, color, size and text alignment. When finished, click “Save”.

If you want to edit, cut, copy, paste or delete the note, you must select the note in question and use the respective commands.

To associate a Note to a document or file follow the steps below:

1. Select a file (text, audio, video or image) available in the Internal or External Sources;
2. Access the command and assign the note to the document (the command in the Main Menu Sources tab becomes active once you select the file);
3. By clicking a window will appear with the notes previously created where you can choose the note you want to associate;
4. Select the desired note and click Assign.
5. Another procedure that you can use to create and associate a new note is to click “New Note” in the file note of the association window of the note to the file. It is important to note that to edit the contents of an existing note, you should access “Notes”, click the desired note and then the command .

6. Coding System

The coding system is the "brain" of a research project in webQDA. These codes are not arranged in a random or ad-hoc basis, but according to the coding tools available in this area of webQDA (Figure 3).

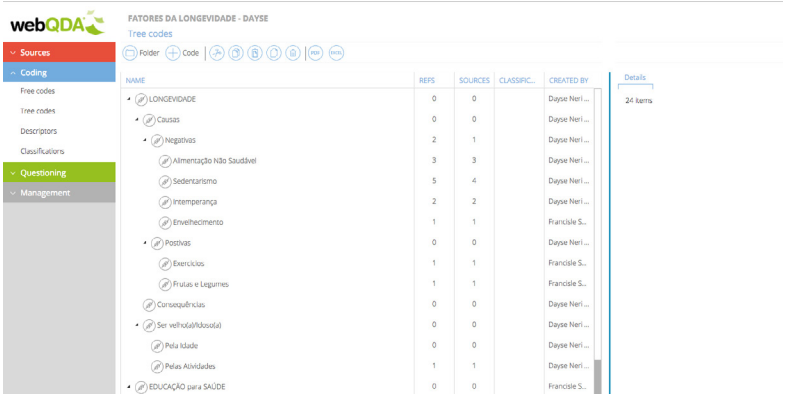

Figure 3 - Coding system.

The coding system offers the following features: i) Free Codes, ii) Tree Codes, iii) Descriptors and iv) Classifications/Attributes. These tools provide the user organization, freedom and flexibility to encode the data.

6.1 Free Codes

As its name indicates, "Free Codes" organize binding topics of ideas with no defined hierarchical system (with no connection between codes). To create a new Free Code you should take the following steps:

1. In Coding select "Free Codes";
2. Then select the command ⊕ "Code" ;
3. Then a window will pop up where you must provide a name and describe the code you want to create;
4. Click "OK" and the name of the created code will appear.

6.1.2 Coding in the new Free Code

Note that after creating a new code a view in columns appears, in which one of the columns, called "REFS" (references), there is a zero. This means that there is no reference (Text Unit, Indicator, among other denominations to which they may be assigned) codified in the Code.

To code in one Code take the following steps:

1. Open, in the Internal or in the External Sources, the document that includes the text to be coded;
2. Select the text to encode;
3. On the right tab the "Code" command will appear;
4. Select the desired Code or Codes;
5. Click the "Code" command.

After coding it is possible to see in the "REFS" (References) column the number 1. This number indicates that a unit of text (called reference in webQDA) was coded. To open the code with all the coded extracts, select the name of the Code.

6.1.3 Exporting a Free Code already encoded

Often users need to print or export these coded references in each Code. Next we will describe step by step how to proceed to export a certain Code (category):

1. Open the Code with all the coded sections you want to export in .pdf or .xls format;
2. Click the name of the Code;
3. Then access the command PDF or EXCEL to export the respective Code.

6.1.4 Decoding contents in a Free Code

The contents, text units or indicators (in webQDA designated as references) encoded in the Codes can only be removed through the decoding process. If the user wants to delete or rewrite the text he/she should refer to editing presented in Sources.

To decode some Reference in one Code take the following steps:

1. Click on the code from which one intends to remove the coded reference;
2. Select part or the whole reference you wish to decode;
3. Clicking the command "Decode".

6.1.5 Process of Visualization of Coding. Second Process of Coding and Decoding

Based on an open document it is possible to see in which Code a particular text was coded.

1. Hover the mouse cursor over the text highlighted in yellow;
2. A balloon will pop up with the coding information, indicating in which Code or Codes that reference was coded;
3. In that same balloon it is possible to decode the text of one or more Codes.

6.2 Open Code

The new version of webQDA provides a new tool that allows the user to automatically create "Free Codes" by means of text selection. For this purpose you should:

1. Open one of the sources that you might be coding;
2. Select the word or set of words with which you want to designate the new "Free Code";
3. Select the command ✓ (Open Code);
4. Automatically, in the "Free Codes" table, a new code with the word or words you selected will appear.

Note: The "Open Source" feature only allows to create Free Codes.

6.3 Tree Codes

Just as with the Free Codes, Tree Codes are the tools designated in webQDA for interpretive coding. Tree Codes have the same nature of Free Codes, but they allow to create hierarchies of Codes and Sub-Codes under the desired or necessary depth. Thus, the system coded in Tree Codes can be considered the "central nervous system" that connects the Sources, the Coding and the Questioning, ascribing interpretive meaning and "answers" to the project's research questions.

As the name itself indicates, Tree Codes organize topics that bind ideas in a "branched" system, i.e., a hierarchical system with connection between the Codes.

To create a new Tree Code take the following steps:

1. In Coding select "Tree Codes";
2. Then select the command ⊕;
3. Then a window will appear where you must provide a name and describe the

code you want to create;

4. Click “Ok” and the name of the created Code will appear.

To create a Sub-Code (a code within another Code) you must select the previous Code in which you want the new code to be inserted, repeating steps 2, 3 and 4.

To re-create a Code at the root click once again on the left column “Tree Codes” and then repeat steps 2, 3 and 4 described above.

6.3.1 Coding a new Tree Code

Similarly to the “Free Codes”, in the “Tree Codes” there is a display in columns, where one of the columns, designated “REFS” (References) shows a zero. This means that there is no reference (Text Unit, Indicator, among other designations that may be used) codified in the Code.

To code in a Code take the following steps:

1. Open in Internal or External Sources the document that includes the text to be coded;
2. Select the text to code;
3. The “Code” command will appear in the right tab;
4. Select the desired Code or Codes;
5. Click the “Code” command.

6.3.2 Decoding and recoding content in Tree Codes

The contents, text units or indicators (in webQDA designated as references) encoded in the Codes can only be removed through the decoding process. If the user wants to delete or rewrite the text, he/she should use the editing functionality available in Sources.

To decode a reference in a Code take the following steps:

1. Click on the Code from which you intend to remove the coded reference;
2. Select part or the whole reference you wish to decode;
3. Then click the “Decode” command.

6.3.3 Process of Visualization of Coding. Second Coding and Decoding Process

Based on an open document you can see in which Code a particular text was coded:

1. Hover the mouse cursor over the text highlighted in yellow;
2. A balloon with the information of the coding will pop up, indicating in which Code or Codes that reference was encoded;
3. In that same balloon you can decode the text of one or more Codes.

6.3.4 Coding of Audio, Video and Image

It is possible that the user wishes to work on the indexing of descriptions, interpretations or a combination of both, in factual or inferential texts, so that one can encode the desired contents. At the end of the process there will be a table with contents associated with every Image, Audio and Video.

After the user has made the transcript or description, or a combination of the two as to the audio or video, there should be a table with contents to be encoded and that will be indexed to each video, audio or image file.

Having this table of descriptions available, we can encode the texts of each single row of the table, taking the following steps:

1. Open, in the System of “Internal Sources” or “External Sources”, the audio, video or image files you wish to encode;
2. Choose the Code or Codes to be coded;
3. Select the text or table row to code;
4. Click the “Code” command.

6.4 Mobility and Flexibility between Free Codes and Tree Codes

webQDA allows the user to move any Code between the various Coding tools. You can, for example, move a “Free Code” to the “Tree Codes”, it also being possible to” “Copy”, “Cut”, “Paste”, “Merge” and “Empty”.

Process for copying one Code (Copy and Paste):

1. Select the Code you want to copy;
2. Click “Copy”;
3. Select the Code to be associated with the copied Code;
4. Click “Paste”;
5. Click the Code and verify that all the coded references were transferred.

Process for moving one Code (Cut and Paste):

1. Select the Code that you want to move;
2. Click “Cut”;
3. Select the Code you want to associate to the cut Code;
4. Click “Paste”;
5. Click the Code and verify that all the coded references were transferred.

In this process the original code is automatically deleted after you click Paste. If you want to move to the root, simply select one of the features (Free Codes, Tree Codes, etc.) of the webQDA Coding.

Process for copying or moving the content of one Code (Copy or Cut and Merge):

1. Select the Code from which you only want to copy or move the coded references;
2. Click Copy or Cut;
3. Select the code where you want to “dump” (merge) the Code references previously Copied or Cut to (in this case there must always be a code that will receive the copied or cut references);
4. Click “Merge”;
5. Click the Code and verify that all references copied or cut were added to those already existing in the selected code.

In this process, the original code is not deleted, references only being copied or moved (content or text units).

Process for deleting all the content in one Code (Empty):

1. Select the code that is to be emptied;
2. Click (Empty).

In this process, the original code is not deleted, references only being eliminated (content or text units).

WARNING: This process is irreversible!

6.5 Descriptors

There are two tools for descriptive encodings (Descriptors and Classifications). The most generalizable difference between these two features is that the "classifications" are "descriptive labels" applied to entire files available in the Sources, while the descriptors are "descriptive labels" for parts, excerpts or text units (references) of the files in the Sources.

We now show how to create these Descriptive Codes on the Data Bases:

1. In section "Coding" click "Descriptors";
2. At the top click the command ⊕ "Keywords";
3. A window will appear where you should place the title and the code description to be created;
4. To finalize click "OK".

To create a Sub-Code you simply select the Code that is in the previous hierarchy and click ⊕ "Descriptors", repeating steps 3 and 4.

To re-create a Code at the top of the hierarchy, just repeat steps 1, 2, 3 and 4.

6.5.1 Encoding Descriptors

The encoding of descriptors is similar to the encoding of Free Codes and Tree of Codes, but with some peculiarities. In the Databases it is possible to select a reference (e.g., a part of a post) and code in various Codes (Gender, Age, Occupation, etc.) in a single selection and then encode. In the Cases, the user must, for example, select an entire interview from a particular individual.

Take the following steps for this kind of codification:

1. Open the document to be coded;
2. At the top select the option "Descriptors";
3. A separator will appear on the right with the descriptors previously created;
4. Select the Case to be coded;
5. Click "Encode".

6.6 Classifications/Attributes

The tool to assign a “descriptive label” to a whole document in an easy and flexible way is called Classifications. In the Classifications feature one can create labels or Attributes, but these labels are only allocated to the documents available in the Sources. First let’s create the Classifications through the following steps:

1. In the section “Encoding” click “Classifications”;
2. At the top click the ⊕ “Classification” command;
3. A window will appear where one has to assign the name to the Classification that you want to create.

Classifications are merely the organizers of the Attributes, not being active. Only when we create Classifications and click on a particular Classification, e.g., PEOPLE, do the Attributes become active.

To create a new Attribute take the following steps:

1. Select the desired Classification;
2. The function “New Attribute” becomes active;
3. Click New Attribute;
4. A window will appear where you should fill in the name and description of the Attribute;
5. Choose the type of attribute (text, integer, decimal, or date);
6. Finally click ⊕.

6.6.1 Apply the attributes created (code) to the files

After creating the attributes in the Classifications the user will have a set of “labels”. Now it is necessary, in the Sources, to assign these “labels” to each file (when applicable). In the case of an interview, one can apply a certain profession to the entire document. Classifications are an easy way to assign descriptive encoding to a file. For example, online forums transformed into a single document are not applicable to professions, as normally each post in the forum is from a different person, who may have a different profession from another.

To assign classifications created to each file (when applicable) take the following steps:

1. Select a file in the Sources (e.g., an interview);
2. This will appear on the separator on the right, where you should select the applicable classification, for example, from applicable classifications PEOPLE or ENTITIES;
3. Click “Save” after assignment;
4. Repeat the procedure for each of the applicable files.

The user can create new attributes or modify existing ones, being able to assign attributes that are missing.

7. Questioning System

webQDA has several tools to support this process of questioning and of searching answers. These tools allow you to perform searches on data that would not be feasible or even possible without these features (Figure 4).

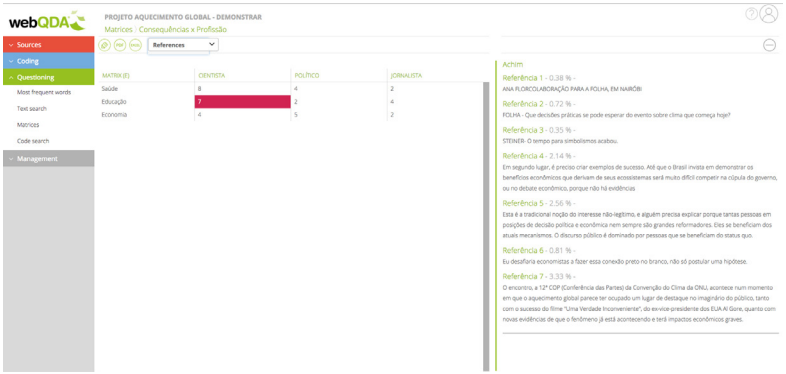

Figure 4 - Questioning System.

webQDA has four features in the Questioning System:

1. Most Frequent Words;
2. Text Search;
3. Matrices;
4. Code Search.

7.1 Most Frequent Words

The commands in the feature “Most Frequent Words” are on the side menu, after clicking “Questioning”.

To add a new word:

1. In Questioning System select “Most Frequent Words”;
2. Click the ⊕ “Word” command;
3. A new space will emerge to fill in the Name, Description, Properties and Restrictions;
4. Assign a designation to the search in Name. For example: “What are the 150 most frequently used words in all the documents?”;
5. In the Description formulate a search guiding question;
6. On the “Properties” tab there are two options:

- **I) Quantity -** In Quantity, type the number of the most frequent words to search in the entire corpus of data. For example, if you type 150, webQDA will search the 150 words which are most repeated in all the documents available in the Sources;
- **II) Dimension -** In the Dimension option you can set the lower limit of characters of words to search for. For example, if you type “2”, webQDA will search the most common words that have more than two letters, that is, “a”, “it”, “of,” among others, will be outside the list of the most frequent words of this search. Of course, this process can be reversed and modified.

7. In the “Restrictions” tab, you can consider all the documents placed in the sources or only part of them, it being possible to: i) include only selected files from the sources ii) delete the files or entire folders of the research, or iii) not consider any restrictions, thus including all documents/files from the sources (text, notes, audio, video and image). By default, webQDA will not make restrictions on your search, considering absolutely everything that exists in the sources.

To run a restriction on a determined search in Most Frequent Words, you should take the following steps:

1. Access the “Restrictions” tab in the “Most Frequent Words” menu;
2. Select inclusion or exclusion. For example, if you narrow down your search to only one document from the sources, select “Inclusion”. On the contrary, if the search is performed on all files, except for a specific document/file in the sources, select “Exclusion”;
3. Then click the command ⊕ ;
4. This brings up a new window where you should select the source where you want to perform the search;
5. Click “Save”;
6. To end the process you should, at the top, click the command 🖫 (Save).

After you click (save), in the feature “Most Frequent Words” a preview of the designated name for the search “150 words” will appear. Clicking it, the result of the search for the 150 most frequently used words in the data will be displayed in the form of text in the Sources.

7.2 Text Search

While the search for “Most Frequent Words” searches all the most repeated words in the text, the text search can be done by words or set of words that you designate. In this case it is the user who previously thinks of a word or phrase and performs a search to see if it exists in the corpus of data. In this case it is important that the user knows the data and the research questions that allow him/her to be able to select some keywords that are of interest for the study in the context of the data around this word or these words.

To make a “Text Search” take the following steps:

1. In Questioning System > Text Search, we find the ⊕ “Search” command;
2. A new space will emerge to fill in the Name, Description, Properties and Restrictions;
3. On the main tab you must enter the name of the search you want to do and the question that you want to answer in the “Description”. (For example, you can name a search called “Health” and, in the description, ask: *“Is there, on the issue of the words breathing, lung, allergy and similar words in the discourse of the interviewees, some indication about the consequences of global warming on human health*”);
4. In the “Properties” tab you can define the words or phrases to search for. This is where webQDA will “read” the words you need. (In the example given, define **respir* ||OU|| pulm* ||OU|| alerg***, using special characters in the check box).
5. Restrictions - In text search, you can consider all the documents placed in the sources or only part of them. In this tab you can: i) include only the files selected from sources, ii) exclude the files or entire folders from the search, or iii) not consider any restrictions, thus including all documents/files from sources (text, notes, audio, video and image). By default webQDA will not make restrictions on your search, considering absolutely everything that exists in the sources.

To run a restriction on a specific Text Search, you should take the following steps:

1. Access the “Restrictions” tab in the “Text Search” menu;
2. Select inclusion or exclusion. For example, if you narrow down your search to only one document from the sources, select “Inclusion”. On the contrary, if the search is performed in all files, except for a specific document/file in the sources, select “Exclusion”;
3. Then click the command ⊕ ;

4. This brings up a new window where you should select the source where you want to perform the search;
5. Click “Save”;
6. To end the process you should, at the top, click the command (save).

After you click , in the feature “Text Search” a preview of the designated name for the search will appear. Click the search name and the search will be displayed for the words *breathing, breathable, breathe, lung, pulmonary, allergy, allergic* (Ignoring accents if in a language like Portuguese, Spanish or French, for example) and other terms to supplement the words after the asterisk. This search will be conducted in all the data that is in the form of text in the Sources.

7.3 Matrices

The question one must make to structure the development of Matrices is one of the most important and versatile tools that you have in webQDA.

To run new Matrix take the following steps:

1. In the “Questioning” System click “Matrices”;
2. Click the “Matrix” command;
3. A new environment will appear;
4. Name the search in “Name” (example: “Consequence x Profession”);
5. In Description formulate a guiding question for the matrix (For example: Is there a relationship between the profession of respondents and their opinions about the consequences of global warming?).
6. Below there are four tabs:

- **Lines** - In the Lines tab click to select the codes that appear in the rows of the matrix. It will open a new window so that you navigate and choose the required codes by selecting the check boxes next to each name. Then click “Save”. Going back to the initial tab environment you can add new codes by clicking again on “+” or eliminate one or more codes, selecting the code and then clicking Remove;
- **Columns** – Selecting the Columns tab, click to select the codes that appear in the columns of the matrix. A new window will open that enables navigation and selecting the desired codes, selecting the check box next to each name. To complete just click “Save”;
- **Relationship** - In the third tab “Relationship”, the user must define the relationship between the selected rows and columns. There are three options: AND (intersection) OR (inclusion) and NO (exclusion);
- **Restrictions** – In questioning through matrices the user can consider all the documents placed in the Sources or only part of them. In this tab you can: i)

include only the files selected from the sources, ii) exclude the files or entire folders from the search or iii) not consider any restrictions, thus including all documents/files from the Sources (text, notes, audio, video and image – in these last three cases, the text entered by the user in the segments, as indicated on their pages). By default webQDA will not make restrictions on your search, considering absolutely everything that exists in the Sources.

To run a "Restriction" on a questioning through Matrices, take the following steps:

1. Access the "Restrictions" tab in the menu Matrices;
2. Click on ⊕ and select the items you want to restrict (For example: if you narrow your search down to only one document from the sources, select "Include". On the contrary, if the search is performed in all files, except for a specific document/file in the Sources, select "Exclude");
3. Click "Save" to complete the operation.

After configuring the Matrix it is necessary to run it. By clicking on the name of the matrix just created, it opens in a new environment, containing the requested matrix. You can export the contents of the matrix to PDF or Excel. When the matrix is run, the result of the matrix is presented in the form of number of encoded sources, but it can be presented by number of References and number of Words. It is important that the user is capable of distinguishing and reasoning about these three different ways of presenting the results in the same intersection on a matrix.

7.4 Code Search

Just as with the questioning tools previously presented, the Code Search is a tool that will help the user to find clues that will help build an answer for their coding prospection questions with a view to answer their research questions.

To do a Code Search the user should take the following steps:

1. Select "Code Search" in Questioning System;
2. Click ⊕ "Search";
3. A new environment will appear;
4. In this new environment you should write a name for the search and a description. In the description, formulate a guiding question for the Code Search;
5. Below you will find two tabs: i) File and ii) Restrictions;
6. In the Files tab you can click ⊕ and add items by clicking on the categories (descriptive and/or interpretive) to create the Code Search;
7. Finally you must click "Save".

To run a “Code Search” just click on the file name. The result will be the equivalent of a cell of a matrix with its references open in a document.

To run a restriction on a specific “Code Search”, take the following steps:

1. Select the tab restrictions in the “Code Search” where you want to create restrictions;
2. Select the restriction type: inclusion or exclusion (For example, if you restrict the search just to a document from the sources, select “Include”. On the contrary, if the search is performed in all files, except for a certain document/ file from the sources, select “Exclude”);
3. A window will appear where you should select the files or folders to include or exclude from the search;
4. Finally click “Save”.

At this point, it should already be clear that webQDA offers tools that can lead you to the boundaries of creativity, of deep thinking and of the power of user questioning at the service of your research.

www.webqda.net

cidtff
centro de investigação
Didática e Tecnologia na Formação de Formadores

Micro I/O
serviços de electrónica, lda.